

WILLAMETTE VALLEY VINEYARDS

*“Pinot Noir made with consideration
for the environment, employees, and
community simply tastes better.”*

Jim Bernau
Jim Bernau, Founder/Winegrower



WillametteValleyVineyards.com

8800 Enchanted Way SE · Turner, Oregon 97392 · 1-800-344-9463 · info@wvv.com

Jim Bernau, Founder/Winegrower

Building a Dream

The “budwood” of Willamette Valley Vineyards began long before its founding in 1983 by vintner Jim Bernau. His Dad, a Roseburg lawyer, was hired by a California winemaker to secure one of the first winery licenses in Oregon since Prohibition. Jim’s Dad allowed small tastes of Richard Sommer’s wine at the dinner table, lighting a path that led Jim from home winemaking to studies at UC Davis and eventually Beaune, France. His early “winemaking” grew more from mischief when at the age of 10, he liberated his Mom’s frozen Concord grape juice from the freezer following the description of fermentation in the family’s set of Encyclopedias.

In 1983, with the encouragement from winemakers making their move from California, Jim cleared away an old pioneer plum orchard in the Salem Hills, hidden underneath scotch broom and blackberry vines. Unable to afford drip irrigation, he watered them by hand using 17 lengths of 75’ garden hose to get the grapelings through their first summer.



America’s Community-Funded Winery

Willamette Valley Vineyards became the first SEC authorized community-funded business in the U.S. through the first successful Regulation A self-underwritten public offering in 1989. The winery has grown with the support of wine enthusiasts through Preferred Stock Ownership (NASDAQ: WVIP) funding new vineyards, wineries and experiences.



Winery Owners gather at the Groundbreaking Celebration in 2017 to help harvest the first Pinot Noir crop from Bernau Estate Vineyard.

History

1983 Founder Jim Bernau began planting Pinot Noir vines in what's now called the Bernau Block at the Estate in the Salem Hills.

1988 Jim accompanied a delegation of Oregon winegrowers to help arrange the import of French Chardonnay budwood — the renowned Dijon clones.

1989 Became the first successful, community-funded winery in the country with a self underwritten Regulation A Public Common Stock offering, extending Ownership to wine enthusiasts.



1990 The winery began a glass recycling program offering ten cents per bottle for all wine bottles returned to its Tasting Room.

1996 Willamette Valley Vineyards partnered with Quail Run Vineyards to make the first vintage of Griffin Creek wines and the Merlot was named “Best Red Wine in Oregon” by *Wine Spectator*.

1997 The winery became a founding member of LIVE (Low Input Viticulture and Enology) and Salmon-Safe.

WVV merged with Oregon wine pioneer Bill Fuller and his Tualatin Vineyard planted in 1973, one of the oldest and most respected vineyards in the Willamette Valley.

2002 Wines appear on NBC's hit television show “Friends.”

2007 Upon the O'Briens' retirement in 2007, Elton Vineyard was contracted under a long-term lease.

Became the first winery in the world to use sustainable cork stoppers certified by the Rainforest Alliance to Forest Stewardship Council (FSC®) standards.



2014 Remodel of the Estate Tasting Room, Patio and Courtyard, plus expansion of the Barrel Room and addition of two Winery Suites was completed.

2015 Launched Oregon Estate Vineyards to build boutique brands on some of Oregon's most intriguing vineyard sites. To fund the effort, the winery issued a Preferred Stock Offering inviting new Owners to be part of Oregon's wine future. To date, brands include Elton in the Eola-Amity Hills, Pambrun in the Walla Walla Valley, Maison Bleue in The Rocks District of Milton-Freewater and Bernau Estate in the Dundee Hills.

2018 Started the process to convert the Bernau Estate Vineyard in the Dundee Hills to biodynamic practices.

2019 Founder Jim Bernau and Justin King of King Estate Winery accepted the Innovator of the Year award at the *Wine Enthusiast* Wine Star Awards for Oregon Solidarity, a collaboration wine to support Rogue Valley winegrowers whose contracts were abruptly canceled.



2020 Willamette Wineworks opened in Folsom, CA.

Winery Developments



Bernau Estate in the Dundee Hills

Bernau Estate will produce world-class méthode champenoise sparkling wines with an underground aging cellar and biodynamically-farmed



Bernau Estate construction in progress (April 2020).

vineyard. You will take pride in our sustainable farming practices that create a balanced ecosystem generating healthy soil and elegant wines. The winery will offer Oregon-inspired hospitality with wine and food pairings, stunning views, educational tours and beautiful gardens for you to explore.

Willamette Wineworks® — Our First Prototype Outpost

Willamette Wineworks, a microwinery located in the Roundhouse building in revitalized Historic Folsom, California features food and wine pairings and a unique Barrel Blending System allowing you to create your own wine blends. Founder Jim Bernau's family in Folsom has brought this idea to life and enabled us to take the Oregon wine story on the road.

Folsom's winemaking history dates back to the mid-1800s with the planting of Natoma Vineyard. In the early 1900s, this vineyard boasted 2,000 acres as one of the largest vineyards in the nation, but when gold was discovered on the property, the vines were replaced with dredgers. Join our dream to reestablish Natoma as a celebrated wine brand in California.



Winery Highlights

World-class Wines Through Shared Ownership

Founder Jim Bernau believes among the healthiest forms of business are those owned by the community. Jim's vision of organizing the support of wine enthusiasts to make world-class wines through shared ownership has resulted in more than 16,000 owners.

Oregon's Leading Producer of Willamette Valley Appellated Pinot Noir

The winery sources all of its barrel-aged Pinot Noir from its estate-grown vineyards and meticulously farms, by hand, nearly 500 acres in the hills of the valley.

Stewardship of the Land

Since the winery's founding in 1983, stewardship of the land has been a key principle in our winemaking and farming practices. The estate vineyards are certified sustainable through LIVE (Low Input Viticulture and Enology) and Salmon-Safe. In addition, Willamette Valley Vineyards was the first winery in the world to use cork certified through Rainforest Alliance to Forest Stewardship Council standards. Cork is a natural and sustainable product where the cork bark is only peeled every nine years as the tree continues to sequester carbon throughout its long life. Natural cork enclosures reduce a bottle of wine's carbon footprint by 25% (*The Drinks Business*).

Our Vineyards

Willamette
Valley AVA

OREGON



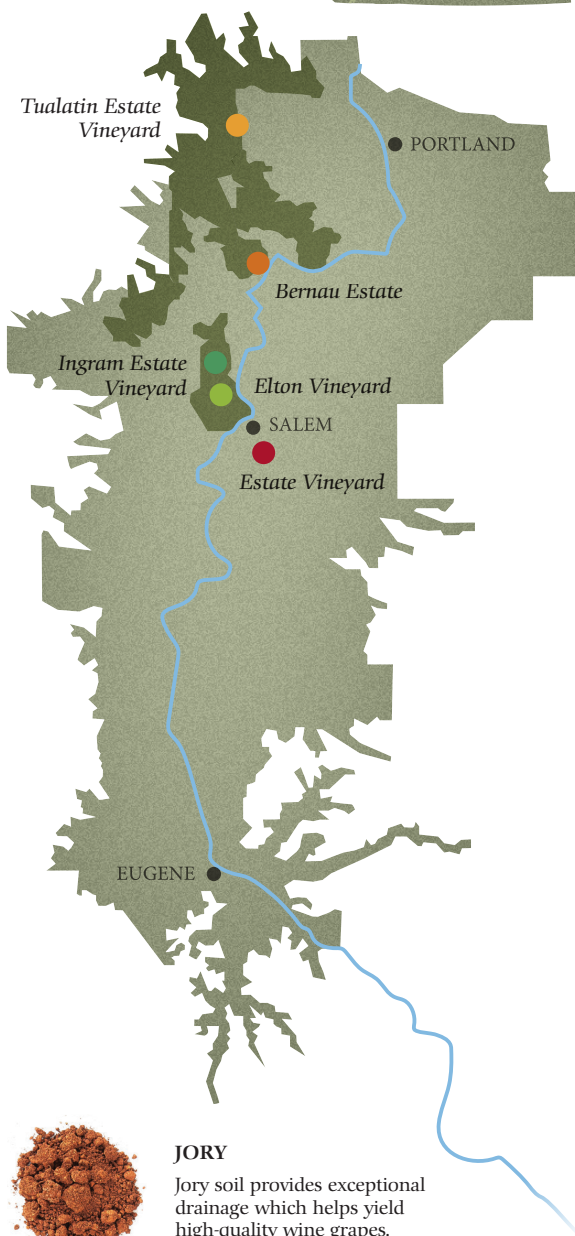
● **Estate Vineyard**
Salem Hills
Est. 1983 by Jim Bernau
SIZE: 67 acres
ELEVATION: 500-750 feet
SOIL: Jory and Nekia
VARIETALS: Pinot Noir, Chardonnay, Pinot Gris
CERTIFICATIONS: LIVE and Salmon-Safe

● **Elton Vineyard**
Eola-Amity Hills AVA
Est. 1983 by Dick and Betty O'Brien
SIZE: 67 acres
ELEVATION: 250-500 feet
SOIL: Jory and Nekia
VARIETALS: Pinot Noir, Chardonnay, Pinot Gris, Grüner Veltliner
CERTIFICATIONS: LIVE and Salmon-Safe
ACCOLADES: Named one of Oregon's top ten vineyards by *Wine Press Northwest*, listed as one of five key vineyards in the Eola-Amity Hills AVA by *Wine & Spirits Magazine*.

● **Tualatin Estate Vineyard**
Tualatin Hills AVA
Est. 1973 by Bill Fuller
SIZE: 171 acres
ELEVATION: 250-530
SOIL: Laurelwood with iron concretions called Pisolites
VARIETALS: Pinot Noir, Chardonnay, Pinot Gris, Pinot Blanc, Sauvignon Blanc, Riesling, Muscat
CERTIFICATIONS: LIVE and Salmon-Safe

● **Bernau Estate Vineyard**
Dundee Hills AVA
Est. 1994
SIZE: 18 acres
ELEVATION: 230-280 feet
SOIL: Woodburn silt loam over marine sediment
VARIETALS: Pinot Noir, Pinot Meunier, Chardonnay
CERTIFICATIONS: in process to become biodynamic

● **Ingram Estate Vineyard**
Eola-Amity Hills AVA
Est. 2013
SIZE: 160 acres
ELEVATION: 250-530 feet
SOIL: Jory
VARIETALS: Pinot Noir, Chardonnay
CERTIFICATIONS: LIVE and Salmon-Safe



JORY

Jory soil provides exceptional drainage which helps yield high-quality wine grapes.



NEKIA

Nekia soil retains less moisture which means grapes ripen earlier.



PISOLITES

The top layer of the Laurelwood soil of Tualatin Estate is riddled with deposits of unique, iron concretions called "pisolites" and are caused by the weathering of minerals.

"One of America's
Great Pinot Noir
Producers"



Left: Elton Vineyard has deep, volcanic Jory soil with a top layer of Woodburn sedimentary soil deposited by the cataclysmic Missoula Lake Flood. The vineyard was planted around a “glacial erratic” white granite that rafted in a chunk of glacial ice in the flood waters from Montana and Canada — contributing a unique aroma and flavor profile.
Right: Dick O'Brien (1940–2016) and the glacial erratic that now serves as the family headstone.



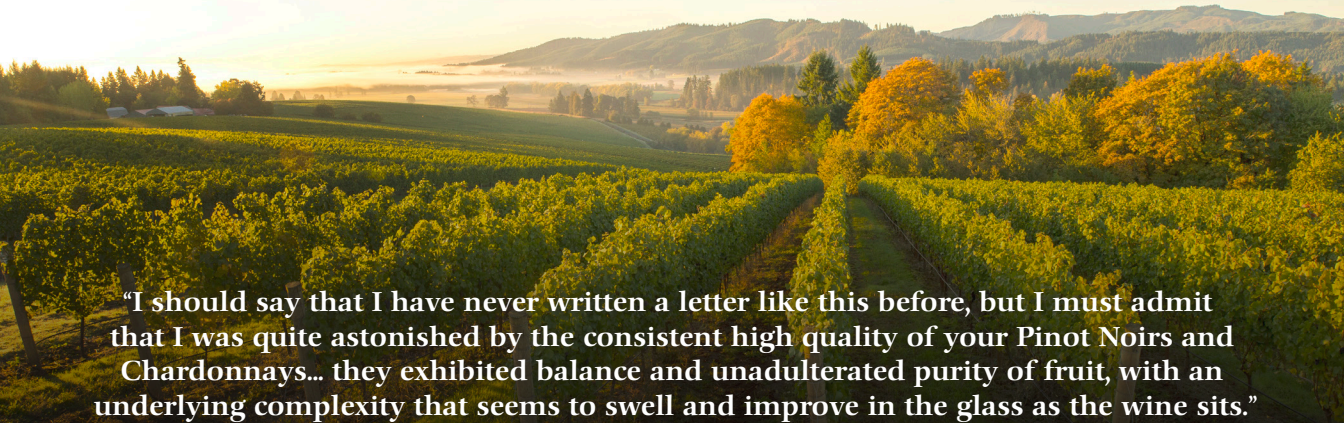
Willamette Valley Vineyards winemaking team celebrates a successful 2019 harvest. Right: Vineyard Manager Efrén Loeza began working at Tualatin Estate Vineyard at the age of 17 and has worked in our vineyards ever since — more than 40 years! He received the Oregon Wine Board's first Vineyard Excellence Award in 2016.



Oregon Wine Pioneer Bill Fuller



Winemaker Joe Ibrahim and Associate Winemaker Gabi Préfontaine



“I should say that I have never written a letter like this before, but I must admit that I was quite astonished by the consistent high quality of your Pinot Noirs and Chardonnays... they exhibited balance and unadulterated purity of fruit, with an underlying complexity that seems to swell and improve in the glass as the wine sits.”

Robert Parker of *The Wine Advocate* in a letter to Bill Fuller, Founder of Tualatin Estate.

Winemakers



Jim Bernau
Founder/Winegrower

Willamette Valley Vineyards was established in 1983 when Founder Jim Bernau planted an overgrown pioneer plum orchard in the Salem Hills with Pinot Noir, watering his vines with a garden hose. While the vines were growing, Jim concentrated on helping Oregon Winegrowers by passing legislation on making wineries a permitted use on farmland, the direct shipment of wine, wine tastings in stores and restaurants, and later the establishment of the Oregon Wine Board. Jim's personal gift to Oregon State University established the first professorship for fermentation science in the nation.

Jim believes among healthiest forms of business organization are those owned by the community. He conducted the first "crowdfunding" in the nation to build his winery by obtaining permission from the Securities and Exchange Commission in 1988, resulting in a growing fabric of laws allowing community-based funding for small businesses. Willamette Valley Vineyards has grown to more than 16,000 wine enthusiast shareholders and is listed on the NASDAQ under the symbol WVVI.

Willamette Valley Vineyards and Jim Bernau have been recognized for environmentally responsible winegrowing by LIVE (Low Impact Viticulture and Enology) as well as receiving the Sustainable Standard-Setter award from the Rainforest Alliance for their use of FSC-certified cork. In 2014, Jim was honored with the Los Heroes de Salud! award for his contributions in providing healthcare to Oregon's vineyard workers. These accomplishments have led to Willamette Valley Vineyards being listed among the top 100 Wines in the World by *Wine Spectator Magazine*, named "One of America's Great Pinot Noir Producers" by *Wine Enthusiast Magazine* and "Winery of the Year" by *Wine and Spirits Magazine*.



Christine Clair
Winery Director

Christine's love for Oregon wine began at an early age when as a young girl she would sell her friendship bracelets in the Willamette Valley Vineyards tasting room. Her life-long connection and passion to fulfill the founders' dream of making world-class Pinot Noir led her back to the winery where she now leads winemaking and vineyard operations, as well as sales and marketing. She is training to replace the Founder/CEO upon his retirement.

In 2015, Christine co-founded a new company division, Oregon Estate Vineyards, with Jim Bernau, dedicated to building boutique wineries on some of Oregon's most intriguing vineyard sites to continue to create and share the Oregon wine story. The wineries include Elton in the Eola-Amity Hills, Pambrun in the Walla Walla Valley, Maison Bleue Winery in the Rocks District of Milton-Freewater and Bernau Estate in the Dundee Hills.

In 2018, Christine helped coordinate the Oregon Solidarity wines to help Southern Oregon winegrowers who had their contracts canceled just days before harvest citing smoke taint. Oregon winemakers teamed up to collaboratively make and sell wines with the net proceeds benefiting the Rogue Valley Vintners

to support vineyards in the region. The collaboration was awarded by *Wine Enthusiast* the Wine Star Award for Innovator of the Year.

Christine has been awarded *Wine Enthusiast Magazine's* 40 Under 40, *Portland Business Journal's* 40 Under 40 and Wine & Spirits Educational Trust Future 50 Award. Christine lends her support as a Board Member for the Willamette Valley Winery Association, International Pinot Noir Celebration and Women in Wine: Fermenting Change in Oregon.

Winemakers



Joe Ibrahim
Winemaker

Joe knew from a very early age that he was destined for a career in viticulture and enology. Growing up in New York, his childhood hobbies included a fascination for growing plants and experimenting in chemistry. When he was old enough, his parents gifted him with a home winemaking kit and he began making all kinds of fruit wines including dandelion wine and turnip wine. Naturally, Joe decided to study Plant and Soil Science at the University of Vermont. After graduating college, he accepted a position with Ste. Michelle Wine Estate in Washington State, where he learned about making wine in the Pacific Northwest. He was later offered a position with Gallo Family in California where he learned about brandy distillation as a Spirits Maker and sparkling wine production as the Senior Winemaker in charge of the sparkling wine program.

He came to discover that his true passion is in crafting premium cool climate varieties like Pinot Noir and Chardonnay. As the Head Winemaker for Edna Valley Vineyard, in one of California's coolest AVA's, he developed a reputation for creating award-winning luxury wines from some of the region's most iconic vineyard sites.

Jim Bernau invited Joe to visit Willamette Valley Vineyards and he instantly knew he had found his new home. Joe proposed to his fiancé Jo in the guest suite on the Estate, the night of his interview and shortly thereafter they moved (with their two dogs) to Oregon to join the winery.



Efren Loeza
Vineyard Manager

It is hard to imagine, but it is true. Efren Loeza has been in the vineyard longer than the winery's Founder, Jim Bernau. Efren came by this unique distinction through Willamette Valley Vineyards' merger with Tualatin Estate Vineyard in 1997. Efren began at Tualatin in 1979 at the age of 17 and has worked in the vineyard ever since. Even more surprising is that the person who taught Efren his first lessons in vine care is still working at Tualatin Estate. Jose Ortiz learned his skills from pioneering viticulturist, the late David Foster. Jose and his brother Roberto Ortiz, Jose Espinosa and Efren's brothers Miguel and Marcos Loeza form a core vineyard staff with as much combined experience as exists in this young growing region.

Efren and his family now live on the estate, in the farmhouse built by the pioneering owners who first grew strawberries on its warm slopes. As Vineyard Manager for all of our vines from Tualatin Estate in Forest Grove to the Estate Vineyard near Turner, Efren has nearly 500 acres under his supervision. Most recently, he was instrumental in planting fifty acres of closely spaced Pinot Noir Dijon clones of 113, 114, 115, 667 and 777 on selected rootstocks.

Though Efren takes time for his family at the Oregon coast or playing basketball and soccer with his four children, he is devoted to the land. His careful vineyard practices and stewardship of the land have earned LIVE and Salmon-Safe certifications for our estate vineyards. He received the Oregon Wine Board's first Vineyard Excellence Award in 2016.



Stewardship of the Land

Since the winery's founding in 1983, stewardship of the land has been a key principle in our winemaking and farming practices.



LIVE & Salmon-Safe

All of our Estate Vineyards have been certified sustainable through LIVE (Low Input Viticulture and Enology) and Salmon-Safe.



FSC® Certified Cork

Willamette Valley Vineyards was the first winery in the world to use cork certified through Rainforest Alliance to Forest Stewardship Council standards. Cork is a natural and sustainable product where the cork bark is only peeled every nine years as the tree continues to sequester carbon throughout its long life.



Raptors in the Vineyard

Partnering with Cascades Raptor Center, we place rehabilitated barn owls and kestrels into our vineyards for natural pest protection.



Wind and Solar Powered

The Estate Vineyard utilizes both wind and solar power. By using wind-powered electricity, we have the same environmental impact as not driving a car 739,488 miles each year, and our solar panels prevent 1,780 tons of CO2 from entering the atmosphere.



Willamette Valley Oak Accord

The winery is one of the founding signatories of Willamette Valley Oak Accord, a grassroots effort to protect and restore remaining oak habitats in the Willamette Valley.



Recycling Water

The winery has a state-of-the-art greywater system allowing us to use significantly less water and filter out organic solids for compost use.



Supporting Native Bee Populations

Our vineyards are home to several mason bee boxes, providing safe nesting places for these native bees, allowing them to thrive and replenish their declining populations.



Our Wines



Whole Cluster® Fermentation

Years ago, Founder Jim Bernau began experimenting with Pinot Noir by gently dropping hand-picked whole clusters in a chilled stainless fermenter, pushing all the oxygen out with CO2 and sealing the vessel tight. What happened next was magical — the berries started to swell and turn pink. When they burst, they released the most aromatic, fermenting Pinot Noir.

In 2015, the first Whole Cluster® Rosé of Pinot Noir was created by fermenting the first free-run juice that burst from uncrushed Pinot Noir clusters. This whole cluster process achieves great color, aroma and flavor in rosé and strengthens our Whole Cluster® Pinot Noir quality.



Pinot Gris was first introduced into the United States from France by David Lett, who planted Gris in the North Willamette Valley at Eyrie Vineyards. Jim got his first cuttings from David. The variety is now Oregon's leading white wine.





As a member of the Oregon Governor's Delegation to Burgundy in the 1980s, Jim sought native French clones to improve Chardonnay quality.

The French Connection

The importation of "Dijon Clones" of Pinot Noir and Chardonnay into the Willamette Valley was one of the greatest tipping points in Oregon wine quality. The state's original plantings, which were brought up from California by emigrating winemakers, produced fruit that failed to fully ripen in cool vintages. The new Dijon clones ripen two weeks earlier, yielding beautifully balanced wines of ripe Chardonnay and acidity.

iSALUD!
To Our Health

Healthcare services for Oregon's Seasonal Vineyard Workers

Willamette Valley Vineyards is a proud supporter of iSalud!. Their mission is to provide access to healthcare services for Oregon's seasonal vineyard workers and their families. In 2013, we presented a founding gift to fund a Mobile Wellness Unit that can travel into the vineyards and provide on-site care. In 2014, Founder Jim Bernau was presented the Los Heroes de iSalud! Award, recognizing his significant contributions to iSalud!'s efforts.



Leda Garside, RN, BSN, MBA & Jim Bernau.



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